

## Utah State FBLA-PBL Assistant Advisor Contractual Evaluation 2007-08

Achievement Rating			
<b>1</b> = MAJOR improvement needed	<b>2</b> = MINOR improvement needed	<b>3</b> = GOOD	<b>4</b> = SUPERIOR

Using the Achievement Ratings listed above, circle the number that best describes the degree to which the advisor meets the quality indicators, which follow.

QUALITY INDICATORS	Rating
<b>1. ADMINISTRATION</b>	
<b>1.1 Pays all bills and invoices at least twice a month.</b>	1 2 3 4
<b>1.2 Prepares updated financial reports for the state advisor and for the board quarterly.</b>	1 2 3 4
<b>1.3 Collects and receipts all incoming funds including membership dues.</b>	1 2 3 4
<b>1.4 Submits the financial report to board members at least one week prior to the meeting.</b>	1 2 3 4
<b>1.5 Working with the state advisor, prepares the proposed annual budget.</b> (Using the projected annual student dues prepares the annual budget for the June board meeting.)	1 2 3 4
<b>1.6 Working with the state advisor, prepares an updated quarterly budget.</b> (Updates the annual budget quarterly and prepares budgets for the leadership, regional, state and new officer training the quarter before the event.)	1 2 3 4
<b>1.7 Working with the state officers, coordinates updates of FBLA and PBL websites quarterly.</b> (Update documents for board meetings and prepares them for posting.)	1 2 3 4
<b>1.8 Uses a computerized accounting system to maintain required financial records.</b>	1 2 3 4
<b>1.9 Maintains transaction records to verify budget year, revenue amounts and sources; dates and amounts of expenditures; and requested and received reimbursements.</b>	1 2 3 4
<b>1.10 Reconciles checkbooks monthly. Each cancelled check or expenditure shown on the statement can be traced to the approved budget, and reconciled with a receipt or voucher.</b>	1 2 3 4
<b>1.11 Keeps financial records at least three years after the year-end financial statement.</b>	1 2 3 4
<b>1.12 Uses checks that contain two authorized signatures.</b>	1 2 3 4
<b>1.13 Uses approved forms and procedures to process reimbursements and payments.</b>	1 2 3 4
<b>1.14 Submits a copy of all requested travel expenses to the board quarterly.</b>	1 2 3 4
<b>1.15 Maintains copies of the FBLA-PBL reimbursable expenses of the state 1% funds.</b> (Updates the reimbursable expense spreadsheet for the advisor and assistant advisor. Brings copies of all expenses that were submitted to BATC for reimbursement.)	1 2 3 4
<b>1.16 Submits all financial records for auditing on a schedule established by the State CTSO Program Coordinator.</b>	1 2 3 4
<b>1.17 Files appropriate forms with the IRS.</b>	1 2 3 4

COMMENTS:	
<b>2. INTERPERSONAL AND COMMUNICATION</b>	
<b>2.1 Communicates effectively with the FBLA-PBL board.</b> (Copies board members on all correspondence with state officers and advisors.)	1 2 3 4
<b>2.2 Communicates effectively with the state FBLA-PBL Advisor and State Business Specialist.</b>	1 2 3 4
<b>2.3 Works cooperatively with the state FBLA-PBL Advisor and State Business Specialist.</b>	1 2 3 4
<b>2.4 Demonstrates effective personal relationship and communication skills.</b>	1 2 3 4
<b>2.5 Acts as a helpful resource to students and advisors.</b>	1 2 3 4
<b>2.6 Working with the state advisor, communicates effectively to chapters through emails and mailings.</b>	1 2 3 4
<b>2.7 Communicates effectively with state officers and state officer advisors.</b> (Copies board members on all correspondence with state officers and advisors.)	1 2 3 4
<b>2.8 Working with the state advisor, effectively communicates information from nationals to advisors.</b>	1 2 3 4
COMMENTS:	
<b>3. FALL LEADERSHIP CONFERENCE</b>	
<b>3.1 Coordinates and assists the state officers with meeting planning, speakers, and workshops for Fall Leadership.</b> (Meets with the state officers from June–August to plan and follows up with the officers and the advisors to verify arrangements have been made. Coordinates speaker contracts, equipment, supplies.)	1 2 3 4
<b>3.2 Supervises the state officers during Fall Leadership.</b> (Provides assistance to the state officers and supervises them the entire conference and know where they are and what they are doing.)	1 2 3 4
<b>3.3 Receives and coordinates registration.</b>	1 2 3 4
<b>3.4 Pays all leadership conference bills and invoices.</b>	1 2 3 4
COMMENTS:	
<b>4. REGIONAL CONFERENCES</b>	
<b>4.1 Coordinates with area chair to assist in regional conferences.</b>	1 2 3 4
COMMENTS:	
<b>5. STATE LEADERSHIP CONFERENCE</b>	
<b>5.1 Receives registration from chapters.</b>	1 2 3 4
<b>5.2 Verifies registration dues for all competitors have been received.</b>	1 2 3 4

<b>5.3 Coordinates and assists the state officers with well organized opening and closing sessions for the State Leadership Conference.</b>	1 2 3 4
<b>5.4 Pays all state conference bills and invoices.</b>	1 2 3 4
<b>5.5 Supervises state officers during the State Convention.</b> (Clearly communicate expectations of each state officer during the entire convention--where they are to be and what they are responsible to be doing.)	1 2 3 4
<b>5.6 Prepares election documents and student officer contracts and assists the state officers in the voting during the area meetings.</b>	1 2 3 4
<b>5.7 Supervises well organized election of state officer candidates.</b> (The application process, ballot preparation, test, interviews, and delegate voting in the area meeting.)	1 2 3 4
<b>5.8 Supervises the scholarship recipients in coordination with FBLA-PBL Advisory Board.</b> (Receives and reviews the applications, organizes interviews as needed and prepares the certificate and award letter.)	1 2 3 4
COMMENTS:	
<b>6. STATE OFFICERS</b>	
<b>6.1 Prepares the agenda and training for state officer advisors.</b>	1 2 3 4
<b>6.2 Arranges contracts for State Officer Training location and food arrangements.</b>	1 2 3 4
<b>6.3 Prepares the agenda and effective leadership training for FBLA-PBL State Officers.</b>	1 2 3 4
<b>6.4 Supervises state officers during the training.</b>	1 2 3 4
<b>6.5 Provides an orientation meeting/presentation for state officer advisors and parents.</b>	1 2 3 4
<b>6.6 Supervises the state officer elections and officer appointments.</b>	1 2 3 4
<b>6.7 Presents expectations for the year to officers and advisors in a combined meeting and an orientation of the expectations at national meeting.</b>	1 2 3 4
<b>6.8 Attends the CTSO planning meeting(s).</b>	1 2 3 4
<b>6.9 Registers students for the CTSO Leadership meeting.</b>	1 2 3 4
<b>6.10 Attends and supervises the state officers at the CTSO Leadership meeting.</b>	1 2 3 4
COMMENTS:	